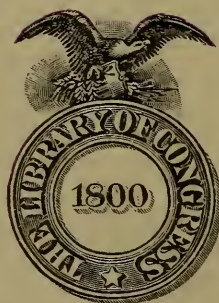


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LIBRARY OF CONGRESS

Notes on the
Care, Cataloguing, Calendaring
and
Arranging of Manuscripts

BY

J. C. FITZPATRICK

Chief Assistant, Division of Manuscripts

LC

WASHINGTON
GOVERNMENT PRINTING OFFICE
1913



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PREFATORY NOTE

The Library of Congress has not made a practice of issuing manuals descriptive of its administrative processes or the specialized treatment of particular collections. In the case of the manuscripts, however, a description seems desirable for several reasons: First, because there seems not to be available in print a practical guide or aid to the treatment of archive material; second, because, in the absence of such a guide, the authorities of the Library have had repeated requests for advice on various technical details connected with such treatment; and third, because the processes at present in vogue in our Division of Manuscripts represent decisions reached by a long and intimate experience with a large and important collection, varied in form and condition, and requiring methods of treatment that will not merely insure safety and permanence, but prompt efficiency in response to a varied demand.

In the case of manuscripts, therefore, it has seemed well to make available in print a description of the procedure in the Library, of the processes, and of the convictions of experience upon which, between varying methods, a choice has been made; and the statement which follows has been compiled not merely as a report of operations in progress, but with a view to its possible utility to other institutions having like problems.

The compiler is Mr. J. C. Fitzpatrick, chief assistant in the division, who has seen the collection grow from the restricted limit of a single room to its present area of three floors, upon which are stored over a million folios of original documents

touching American history from the time of the Columbian discoveries. During this period his personal experience of all the processes has been direct and specific, including not merely the physical handling of the manuscripts and the accessioning, classifying, cataloguing, indexing, and calendaring of them, as well as supervision of the various processes of repair, preservation and binding, but also the ministrant service of the material to investigators.

GAILLARD HUNT,

Chief, Division of Manuscripts.

HERBERT PUTNAM,

Librarian of Congress,

Washington, December, 1913.

NOTES

Manuscripts and manuscript collections should be considered first as to *preservation*, second as to *use*.

1. *Preservation* necessarily precedes use and largely determines and governs it, though it must be borne in mind that a manuscript withheld from consultation might almost as well be nonexistent.

2. *Use* for any legitimate historical investigation, or similar purpose, should be restricted only in proportion to certain physical conditions of the manuscript (manuscripts of a confidential nature, official or personal, are present in all archival collections; but consideration of such papers does not properly fall within the scope of these notes). Where these physical conditions are prohibitive they may be met by photographic reproduction. A manuscript, unlike a rare imprint, is the only one of its kind existent and any defacement is irreparable. It should not be handled hastily; nothing should be laid upon it; it must not be touched with either pen or pencil point and copying should be with pencil if possible, as the open, dripping inkwell is a constant menace to the document. The fountain pen is only less objectionable. With some well-meaning but awkward individuals, however, the pencil for copying or making notes is all that can safely be permitted. Consultation of manuscripts should be allowed only in the presence and under the constant observation of the archivist or his assistants.

3. Sensational exploitation for newspaper or magazine must be guarded against. To this undesirable use of records the archivist has but to oppose his judgment of human nature.

3—*Continued.*

Letters and cards of introduction play an important part here and the rest can be covered by a brief conversation. Fortunately the historical contents of archives are of slight interest to the news gatherer and where the archivist has in charge manuscripts which, under the deed of deposit, can not be shown except with restrictions as to their use, he must see the notes or copies made therefrom by the investigator. The investigator of the manuscripts should be required to make written application for the documents he desires; this application may be a card form which, when properly filed, will prove of reference value to the archivist in the course of time. The application card will, of course, vary to suit different needs, but a form that will meet most requirements may be found in the following:

Name of the Archive Bureau

Applicant: _____

Address: _____

Date: _____

Manuscript: _____

Purpose of investigation: _____



3—*Continued.*

Generally speaking, the risks arise from careless handling of the manuscripts, and a little watchfulness will reduce these to the minimum.

4. *Classes of manuscripts.*—Manuscripts may be divided roughly into two classes: illuminated manuscripts and correspondence or other pen-created papers of official and private daily life. The status of the typewritten letter is yet to be decided definitely, though probably it will be classed in the future with pen-made documents. We are not concerned here either with the care or archival treatment of the illuminated manuscript, a very good discussion of which, together with sound elemental instruction for cataloguing, will be found in Madan's "Books in Manuscript." Also the quantity of American parchments is negligible and seldom anything more than a charter, land deed, patent, commission, diploma, or similar document, parchment almost by accident, for nearly as many of the same class are on paper. These American parchments properly come under the same general rules of classification as manuscripts on paper; and special consideration of them beyond a few questions of preservation and storage may be rightfully ignored. Our interest is with the second class, generally denominated by European archivists as "documents." Here in America we have become accustomed to considering as "documents" the official printed publications of State and Federal authority, which results in a confusion of terms that some day may prove vexatious.

What we call manuscripts, then, are to be divided roughly into two classes: *Official* and *Personal*.

5. *Official* manuscripts are legislative acts, commissions, estimates, land grants, memoranda, messages, military rolls and returns, orders, patents, proceedings, proclamations,

5—*Continued.*

reports, resolves, etc. Personal papers are correspondence, drafts of letters, letter-books, memoranda, personal financial accounts, etc.; but where the papers are those of a public man the line of demarcation between personal and official is often shadowy in the extreme. (See *Cataloguing.*)

6. *Official* papers under the control of the archivist come to him usually with an arrangement and indexing born of administrative necessity, and in no wise competent to answer the needs of the historical investigator. Useless and faulty as such an arrangement may be for students of history and economics, it is well to allow it to stand until such time as the rearrangement scheme has been thoroughly worked out and its application to the papers can be carried through without interruption or delay. The official indexes or finding-list catalogues of such collections should always be preserved no matter how useless they may seem after the rearrangement of the papers. If these indexes are bulky and space consuming they may be condensed by a group classification or outline record, for archival consultation, before being sent to the storage basement. It is the part of wisdom to leave their destruction to the next generation.

7. *Official* papers transferred to the archive bureau from governmental files should be papers whose administrative value has disappeared and that are officially dead—*i. e.*, papers that actual practice has shown are never consulted for administrative purposes. Control over such papers is undesirable, for there can be no right nor claim of historical investigator not legitimately overridden by administrative need; and, where this need continues to exist, its interference would result in practically transforming the archive bureau into an adjunct of the department from which the files came.

8. *Personal* papers of an individual may come into the hands of the archivist untouched, or having suffered but slight derangement. In such cases the existing arrangement should be studied carefully before the necessary archival rearrangement is begun. The first handling of a mass of manuscripts is often most important and needs the ripe judgment and trained hands of the experienced archivist. By carefully skimming through, taking care not to disarrange in the slightest, a general grasp of the collection may be obtained which will aid greatly to proper decisions later. In every collection there are misplaced, wrongly dated and undated documents, unsigned memoranda, inclosures, and apparently disconnected papers, that require careful consideration, as it is a prime archival duty to reduce the unidentified manuscripts in every collection to the least possible number. This consideration is valuable in direct proportion to the knowledge, experience, and "manuscript sense" of the one who arranges the collection. To the trained archivist, any original arrangement (and by "original" is meant the one untouched since the growth of the papers terminated) no matter how faulty from an archival viewpoint, is replete with hints of value to the final archival arrangement and the dating and identifying of the miscellany of the collection. But once this original continuity, whatever it be, becomes disturbed by untrained hands, valuable and time-saving clues are destroyed, the loss of which will necessitate the expenditure of hours of expert research otherwise avoidable. Of course, where papers are received in a confused mass, having been pawed over and tossed about until all semblance of an order is lacking, much of the preliminary and time-consuming work can be performed by less expert hands before the undivided attention of the archivist is necessary.

9. An elemental suggestion here for the actual handling of disarranged papers may prove of assistance. In arranging chronologically a large mass of disordered manuscripts, time, labor, and space will be saved, first by grouping them in decades, then by years; next, group each year into quarters and from thence work down to the individual months; the days of the month may be grouped by tens as a preliminary step to the daily sequence. This may seem an unnecessarily frequent handling of the same papers; but the divisions are easy to control and the speed with which one works under this system will be found to be nearly double that of other methods. Much time will also be saved if, on the first handling, every manuscript dated on the verso or elsewhere than the upper right-hand corner is redated in that corner with a medium soft, fine-pointed pencil.

10. *Arrangement.*—Under ideal conditions no arrangement of papers would be attempted until the collection is card catalogued; but pressure of investigator and ardor of historian seldom justify withholding an entire collection from use pending such work; and cataloguing and calendaring must frequently wait upon arrangement. In this work of arrangement the training, experience, and knowledge of the archivist enable him to settle many vexatious questions, unaided by the data later accumulated from classifying and combining the cards of the properly catalogued collection. And here comes in that intangible something, difficult to describe, impossible to inculcate, but ardently to be desired as a characteristic of every archivist, a “manuscript sense.” It may be called a feeling, that amounts to sympathy, a respect for the frail page that induces a natural gentleness and care in handling; it nourishes an instinct, a sixth sense, that, more often than not, prompts a recognition of the unidentified manuscript before close

10—*Continued.*

scrutiny and knowledge; it pushes forward suggestions of value that have, at the moment, no apparent basis of reason and smooths many difficulties in a manner comprehended, but not entirely understood. It is quite possible to be a good archivist without this "manuscript sense," which, after all, may, with a show of reason, be classed as imagination; but the man who possesses it will always be just a little better archivist than the one, no matter how good, in whom it is lacking.

11. *Collection or group arrangement* is entirely dependent upon the geography of the storage space at disposal and the frequency of consultation of the group. Where the architectural arrangements have been specially designed for archives, under the direction of the archivist, the matter is simple; but such conditions are rare in America as yet. To work out, under the usual restricted conditions, a consistent, coherent scheme for many large groups of manuscripts, and apply it with logical rigidity will generally result in a daily waste of time of both investigator and archival force. No matter how desirable or satisfactory such arrangement may be in theory, in practice its main element will prove to be that of great physical inconvenience and, unless more shelf space is allowed for expansion than usually can be spared, the entire archival collection will have to be shifted periodically as a result of unexpected and uneven growth. The thing to remember is that the classification *arrangement* must depend entirely upon the manuscripts, and that, to a large extent, the archivist must submit to be ruled by his material. Any attempt to force manuscripts into classification schemes similar to that of books means disaster. Flexibility, far beyond the capabilities of book classification, is an absolute necessity.

11—*Continued.*

To evolve a logically perfect scheme of manuscript classification based upon the individual folio or document is beyond utilitarian limits, and to insist upon rigid group classification is to restrict unnecessarily the working efficiency of the archive bureau. The difference between the subject matter of letters and documents and that of books, as well as the physical aspect of the material, would demand an excess of classification detail embarrassing to the point of ineffectiveness.

12. *Arrangement* of individual manuscripts within the various collections should be the simplest possible; the test and almost the sole governing idea should be that of ease and certainty in finding. (See under *Mechanics of Arrangement*). Easy as it is to misplace books in large libraries and difficult as it sometimes is to find them, because of some slight inadvertence in handling, the difficulty in the case of manuscripts is increased tenfold and only the simplest arrangement can reduce the chance of inadvertence to the minimum.

13. *The group arrangement* of the Library of Congress, whose collections are largely Americana, may be of interest and use as a study though seldom applicable to other collections. This arrangement, outside of the large groups of *Personal* papers of great Americans, may be generally termed a chronologic-geographic one. It follows the sequence of events from the discovery of the Western Hemisphere, through exploration and settlement, as naturally developed: First, the West Indies, Spanish America, Mexico, Central and South America general, then by countries in their geographical divisions and strictly chronological within these divisions; then North America, the grouping therein being the British, French, Spanish, and other colonies. This group arrangement carries through the general miscellany to the Revolution, all the manuscripts being of such a general nature as not

13—*Continued.*

to belong clearly to any of the original 13 Colonies. With the assembling of the First Continental Congress the miscellany of the Revolution begins its chronological order, which includes all those manuscripts created by the activities of the general confederation of the Colonies and not clearly emanating from any particular one. The Papers of the Continental Congress form a distinct group within this general scheme. After them, each of the 13 States has its own strict chronological order, which conveniently ignores the Revolution as a period. After the Revolutionary group is the period of the Confederation (1783–1789) and the “United States, miscellaneous” from the latter date on. The individual States, other than the original thirteen, have each its own chronological arrangement, and the Personal Papers, beginning with the noble series of the papers of the Presidents, and following in the order of the administrations, are arranged by groups with the single purpose of convenience in handling. Other groups are those of Indians, Orderly Books, Journals and Diaries, Mercantile Accounts, the Army, the Navy (under these last two groups naturally fall the strictly military and naval operations of the various wars, the civic activities of which are classified under the proper Federal executive departments—see *Mechanics of Arrangement*), Marine Miscellany, Great Britain, the foreign countries, and other clean cut and logically natural groups. The arrangement within each of these groups is strictly chronological; when one or more of them expands to the point where internal subdivision becomes necessary for utility in handling, a chronological order still obtains within the new subdivisions.

14. *Mechanics of arrangement.*—One thing ever to be kept in mind, let it be repeated, is the necessity of arranging individual manuscripts within groups in such order as to insure

14—*Continued.*

prompt accessibility to every document. Whatever the needs of the historian or student who consults the papers, the one requisite of prompt accessibility is common to all and should not for a moment be forgotten. Experience, and by this is meant not the experience of the investigator or user of the manuscripts, but of the archivist, the actual curator of the documents, who is called upon dozens of times a day to locate and produce individual papers and who alone fully comprehends the difficulties of the task, has demonstrated that the strict chronological arrangement by years, months, and days is the only perfectly satisfactory one. It presents a complete picture of the daily course of events as the life of the past was lived; it satisfies the instincts of the investigator by placing the records before him in unbroken sequence of time; it reduces the chances of misplacement of the single manuscript to the minimum, largely obviates unnecessary handling of the papers, throws all the undated material into one place and eases the mind of the historian, as no other grouping can, by assuring him that he has not overlooked anything through failure to consider all of the possible heads under which papers might be grouped in subjective or other classifications. Chronology of his subject is the point with which the investigator is always thoroughly familiar, and an honest criticism or complaint is yet to be lodged against the chronological order when strictly adhered to. By "strictly" is meant *absolutely*. Inclosures are separated from their inclosing documents, if the dates require it, proper notation being made upon the mounting sheet where the manuscript is mounted or, where unmounted, on the verso of the document itself with a medium soft, fine-pointed lead pencil; the list of inclosures on the main document and the main document upon the inclosures. Thus in a letter from Horatio Gates to

14—*Continued.*

George Washington dated 1777, October 1, may be two inclosures; one, 1777, September 15, from the Albany Committee of Safety to Gates; another, 1777, September 7, from Arnold to Schuyler; the notation would be, on the Gates letter to Washington:

Inclosures: 1777, Sep. 7. Arnold to Schuyler.

Sep. 15. Albany Committee to Gates.

and on the Arnold and Albany letters:

Inclosed in: 1777, Oct. 1. Gates to Washington.

The catalogue cards would, of course, give this information when every single manuscript under the archivist's care is represented by a card; but, desirable as this is and devoutly as it may be wished, it is as often not so as otherwise; and in any event the historical investigator justly complains of being forced to turn from manuscripts to cards and back again for information that should properly appear with the manuscript itself. Again, an archivist seldom has a sufficient force of assistants to complete with rapidity the work of handling large masses of material. There are always arrears, and there are apt to be formidable accessions, perhaps the papers of a prominent public man or the transfer of an old official file, minus all semblance of an index. Either accession may mean a collection of from 10 to 100,000 separate manuscripts, and the time necessary to card such a collection properly, with a force of but two or three assistants, would consume weeks even if there were no other archival work to be done. Such accessions may occur monthly or oftener. Obviously it is out of the question to withhold papers from consultation by responsible historians until such time as they can be catalogued. Manuscripts should be available for the historian's use as soon as arranged. Under the chronological

14—*Continued.*

order he can work as easily and surely without cards as with them; and, indeed, the experienced investigator, studying a personage, movement, or period and not wishing merely to verify a single detail, seldom uses the cards beyond the point of obtaining therefrom his bearings. Their value to him is relatively slight compared with their importance as an archival record.

15. Undated papers to which dates can not be given should be placed at the end of the dated material, *i. e.*, papers lacking date entirely, at the end of the entire collection. Those dated with the year only, after December 31 of that year; those dated with the year and month, but not the day, at the end of the month. In each of these places an alphabetical arrangement of the undated pieces will prove an additional convenience in identification. As this is, in the main, a brief discussion of what to do rather than what not to do, the many faulty arrangements possible need not be considered. There are, however, three that should be specially warned against. First, any attempt to place letter and answer together; second, because of its seeming allurements, the division of a collection of personal papers into letters from and letters to; and third, any grouping based upon the subject-matter of the manuscripts. The objections to the first are too obvious to need mention; the second uselessly duplicates the internal arrangement, increases fourfold the liability of misplaced manuscripts, doubles the time necessary to arrange the collection, leaves the unidentified miscellany well-nigh hopelessly stranded as to position, and to archivist and investigator alike forever remains an exasperation. It is apparently a most convenient arrangement for the study of the writings of an individual, but is not entirely dependable or satisfactory even in such case.

15—*Continued.*

Against this one need fulfilled are dozens of others, arising daily, and from the standpoint of biography and of history, equally important, for which the arrangement is the most inconvenient possible. The physical difficulty of consulting two distinct sets of the same papers at the same time distracts the attention and seriously hampers inclusive research, while it unnecessarily demands double the amount of labor from the archival force. The third, or subjective grouping of manuscripts, is an especially deplorable arrangement. Manuscript letters or documents treating entirely of one subject are rare, and the basis of the subjective arrangement is shifted at the very beginning from the historical information in the manuscripts to the judgment of the classifier respecting that information. Nothing is more bitterly resented by the historical investigator than intervention of any kind between himself and his original sources, and the resentment is justifiable. A subjective arrangement can be nothing but a series of compromises, than which a quicksand is not more shifting, and it is precisely this lack of stability that justly renders it an object of suspicion. Any scheme of arrangement that, like the subjective one, compels argumentative consideration in the placing of documents contains in that one fact ample reason for its rejection.

16. *Official papers.*—In arranging a large mass of official papers, the logical method of a chronological order under the various departments and bureaus of Government from which they emanate is best, *e. g.*, in the case of Federal and State Governments, the United States, and State constitutional divisions of the executive, legislative, and judicial branches, with their major subdivisions, are amply sufficient to care for

16—Continued.

any large deposit. The minuteness of this classification will, of course, depend upon the size of the collection; ordinarily the main divisions only of the three coordinate branches need be considered. Where there are only a hundred or so manuscripts, however, representing almost as many subdivisions and bureaus, it is wise to ignore a classification more complex than the material itself and arrange the papers in one chronological order, working out the governmental classification, if need be, in the card catalogue.

17. Where the nature of the manuscript is unvarying, as in proclamations, commissions, military returns, etc., they can be grouped conveniently according to their natural class; but, except in the case of commissions which are so distinctively personal as to fall naturally into an alphabetical order, chronology should rule in each group. For military returns in great numbers the most satisfactory arrangement is chronologically by organization, brigade, regiment, and company (battalion reports, if any, should be ignored and classed under the regiment); the general returns of corps, divisions, and the whole army to be treated in the same way. Military orders, however, should ignore everything beyond the department or army from which they emanate, and be arranged in strict chronological order, which will be the same as their numerical sequence, if they were officially numbered as issued.

18. *Orderly books*, later superseded by the general and other orders in printed form, military and other journals and diaries should be arranged on the shelves in strict chronological order according to the first date in the books; the inevitable overlapping of dates is of small moment.

19. *Bound volumes.*—Manuscript material in the original binding, such as registers, minute books of proceedings, finan-

19—*Continued.*

cial ledgers, letter books, etc., present no difficulties of arrangement, the physical bulk, size of the individual volumes, and frequency of consultation largely governing in all such cases. In original bindings the volumes are apt either to be unlettered, or lettered with strange inconclusiveness as to contents; especially is this apt to be the case in old Spanish and French volumes of the sixteenth and seventeenth centuries. (See under *Cataloguing.*) Where the volume is unlettered it is necessary to paste (not glue) small stickers to the back, with symbols sufficient to render identification easy. The objection to this from a sentimental standpoint is strong; but the time saved in locating needed volumes is a stronger necessity. The stickers may be of a neutral tint, small in size, and affixed with some regard for the original appearance of the volumes.

20. *The numbering question.*—To number original manuscripts or manuscript volumes is both unwise and impracticable. An attempt to apply schemes similar to those of book classifications will speedily be found impracticable. Numbers upon a manuscript are a disfigurement; they intrude, unexpectedly, upon its validity; they violate its sanctity as the advertisement placard violates that of an ancient tree and in a small collection are of no additional aid to identification. In a large one the digits increase so rapidly as to become unwieldy and obstructive. Nor is it wise to disfigure single manuscripts by labels or "stickers." This is sometimes done, but should be frowned upon, as the prime duty of the archivist is the inviolate preservation of the material in his charge, and any interference with this, any increase of wear and tear, any weakening of the manuscript, tends to shorten the life of the paper.

21. *Miscellany*.—It is in arranging the miscellany that most of the difficulties arise. Large, natural collections, *i. e.*, collections accumulated during the life activities of an individual, or the daily official routine of a bureau or department, present few difficulties compared with those of the single, disconnected paper or a mass of unrelated documents such as would represent the activities of the autograph collector. The lone letter, the solitary indenture, memorandum, commission, deed, etc., papers sometimes valuable historically and nearly always interesting autographically, tempt the archivist to a trial of the subjective or alphabetical arrangements. Occasionally either of these may be permissible; but use of the papers by investigators will demonstrate infallibly the necessity of representing an alphabetized or subjective group by a chronological card arrangement. (See under *Cataloguing*.)

22. *Personal papers*.—There is but one arrangement possible for the personal papers of an individual or family—the chronological. In the case of scientists or literary personages this rule may not be so absolute; but for statesmen, politicians, soldiers, etc., the exceptions are nonexistent.

23. *Storage devices*.—The various mechanical devices for storing manuscripts are as many as the personal crotchets of archivists. Boxes, slide cases, and portfolios, of innumerable pattern and design, are in use, and, so long as each provides ample protection, ease of access, and economy of space, a choice among them may be indifferent. Only the usual manuscript folio document is considered here; for papers of unusual proportion special provisions are necessary, discussion of which would be tedious. The devices here described have the merit

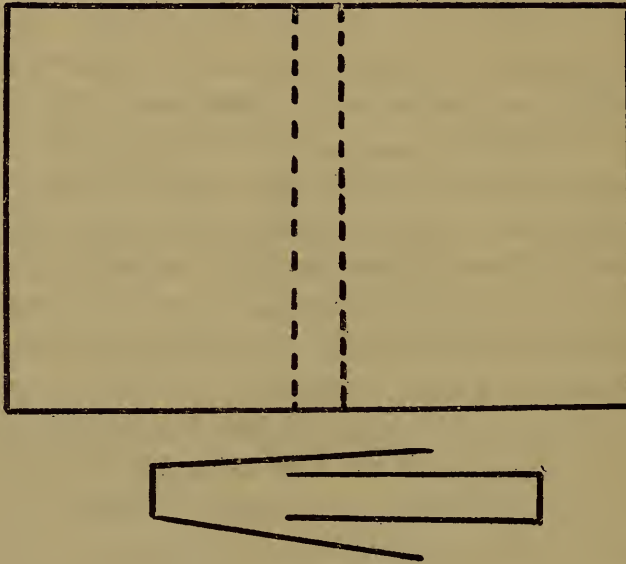
23—*Continued.*

of simplicity and inexpensiveness and are given, not because they are the only ones practicable, but solely because of these two qualities in addition to the three fundamentals before mentioned.

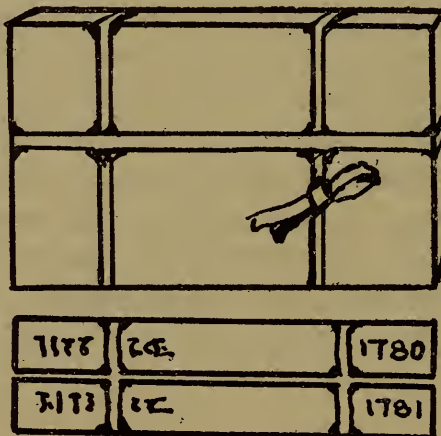
Manuscripts should be stored *flat*, never, under any circumstances, rolled up or folded into the diabolical old-fashion filing cabinet. One fold in a manuscript is a step from the path of righteousness, two a misdemeanor, while three should be classed with felony. Where papers are too large to be stored when opened to their original size, they should be deliberately cut (with straightedge and knife, never with scissors) to such size as is most practicable and at the same time necessitating the least number of cuts; should then be hinged with lightweight tracing linen (see under *Repairs*) and folded flat to the size desired. The reason for this apparent brutality is that the size of the manuscript necessitates folding in any event and, sooner or later, it would break in the folds; so it is better to make a clean cut between lines and fully protect the manuscript with a hinge. To allow it to wear out with time and usage risks the destruction of two or more lines of writing. Manuscripts should never be placed in envelopes; there is no other device so well calculated to reduce them to tatters in the shortest possible time as putting in and taking out from an envelope. An inexpensive method of storing is in packages of from an inch to an inch and a half in thickness, in double folders of manila paper, stout enough to be stiff, yet not so stiff as to be difficult to handle. These folders should be cut to the size approximating the usual folio sheet of manuscript (about 17 by 13½ inches, with the grain

23—*Continued.*

of the paper running with the $13\frac{1}{2}$ dimension) and folded to fit the thickness of the package thus:



They are then placed around the manuscripts and tied with broad tape, a convenient tie being shown:



23—*Continued.*

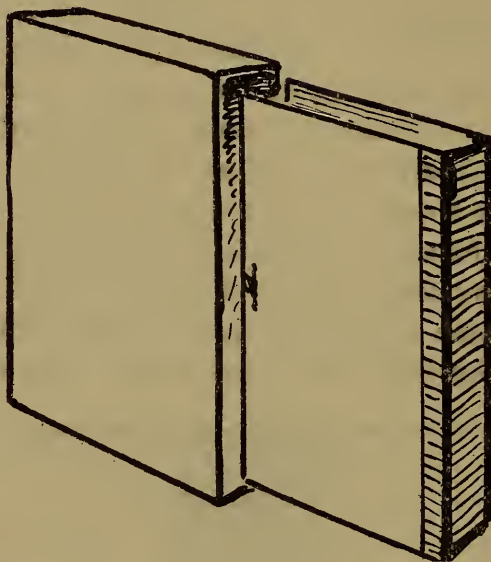
This gives a fairly uniform appearance on the shelves and amply protects the manuscripts. Dust accumulation in the open ends is negligible. The advantages of this method are its inexpensiveness and protection; its disadvantages are easily seen. Very little use of the papers destroys the protective quality of the folder and renders it unsightly, the manuscripts become disarranged and as the packages must be laid flat, never more than three in a pile, there is a waste of shelf room. A step forward is to have the portfolios made of stiff, cheap tar or clay board with stiff backs, hinged with binders' cloth, of the same dimensions as the manila folders plus $1\frac{1}{2}$ inches for the flat-back hinge, and a pair of tie tapes:



These portfolios will, of course, outwear a hundred of the manila folders, but are otherwise open to the same objections; their cost, however, at wholesale is only a few cents each.

23—*Continued.*

A step farther is this portfolio in a slide-box of the same material:



Here we have the manuscripts in the portfolio firmly gripped by the tape tie and such a pressure of the box that the package can stand upright on the shelf without injury to the bottom of the papers. This is the most compact form for storing loose papers and is the last word before the regularly mounted and bound collection. To place each manuscript in a separate, thin manila folder will prove rather impracticable, except where the collection numbers only a few hundred pieces, as it trebles the storage bulk and the additional protection is not sufficient to offset the extra time consumed in storing and labeling. Where this is done, however, the manila folder should be dated in the upper left-hand corner, year first, then month, then day: 1783, June 21. This date arrangement makes for easiest finding; in the center of the

23—*Continued.*

folder a descriptive word or two should be added to obviate the necessity of opening any but the desired folder.

24. *Cataloguing.*—Briefly stated, the catalogue entry for a manuscript consists of every descriptive or bibliographic detail except the calendar or brief of the contents. The catalogue card is for the use of the man who does not know, not for the archival expert or librarian. Necessary technicalities should, therefore, be made as unobtrusive as possible. A convenient form adapted to most contingencies is the following:

1776	Hamilton, A[lexander]. [Capt., [July 3] New York artillery company.] Harlem Plains. To [Maj.] Gen. [Charles] Lee [New York].
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A. L. S. 1 p. 4^o

Location



The card is, of course, the standard library size. The date in the upper left-hand corner arranged as shown, in two lines, without punctuation except where the months are abbreviated. May, June, and July are the only months not so shortened, the others being abbreviated always to three letters, *e. g.*,

24—Continued.

Apr. Sep. The year and the rubric should be written in a bolder and heavier hand; the indentation of the second and succeeding lines being a little greater than that of the rubric line (see also under *Printing*). As the cards written for the main catalogue will take their places among entries covering perhaps the entire world, it will be found that to follow the individual's name with a brief biographical title, in brackets, such as: Statesman, Politician, Scientist, Col., U. S. Army, etc., is of time-saving value to both investigator and archivist. After the name of author or writer of the manuscript and his title, there follows the place from which the letter or document is written; next the name of the addressed, preceded by military or professional title, if any; then the place where he was on that date, if it is of sufficient importance and can be ascertained without undue search. Then follows the calendar or brief of the contents of the letter, which is, however, omitted from a catalogue entry card (see under *Calendar*). The physical description of the manuscript comes next, employing for this purpose the accepted symbols: A. L. S.=autograph letter signed; A. L.=autograph letter; L. S.=letter signed; A. D. S.=autograph document signed; A. D.=autograph document; D. S.=document signed; A. Df. S.=autograph draft signed; A. Df.=autograph draft; Df. S.=draft signed. Occasionally A. N. S.=autograph note signed, and its variants, are used; but this is a refinement more confusing than helpful. The number of pages should be given, i. e., the number of pages occupied by the letter proper only, not counting the address or indorsements. A letter that runs over, even a line or less, on the verso of the sheet is counted as two pages. This may be somewhat misleading to the investigator, but its value to the archivist as an accurate, stable description justifies it. The size of the sheet on which

24—*Continued.*

the letter is written may be given either in the general way: f°, 4°, 8°, etc., as the standard sizes of writing paper of the past usually run, or by the actual measurements in centimeters if preferred. This is a question of personal preference, exigency, and time; it is desirable in any form. Location symbols, showing where the manuscript is to be found, should be placed in the lower left-hand corner of the card. Where the manuscript is one of a large collection, like the Alexander Hamilton papers, for instance, the date is, of course, a sufficient location mark in the chronological order. Hamilton's various military and political titles would be given on a card of biographical memoranda at the beginning of the Hamilton cards, and not monotonously repeated on each entry. The location of the collection in the archives will appear here also, once and for all.

25. All supplied information is inclosed in brackets, the punctuation following the idea of remaining properly placed if the brackets, with their inclosures, were eliminated. The value of accuracy in the use of brackets will quickly demonstrate itself; they present, with succinctness, a complete and accurate bibliographic picture of the manuscript, which is fundamentally necessary to the archival record. Information obtained from the indorsement, no matter by whom, is "supplied information," and bracketed. Where the abbreviated form of a name may mislead, *e. g.*, Abr., which may be Abraham, Abram, or Abner, it should be spelled out in brackets; but it is obviously foolish to bracket Geo. Geo[rge] or Thos. Tho[ma]s. The form of the rubric of the author entry varies under different considerations; if the card is to be filed in the general catalogue of the entire mass of the archival collections, the broad consideration should govern; *e. g.*, United States, Executive, President; but where the cards of a specific collec-

25—*Continued.*

tion are kept together this lengthy form should be ignored. In the papers of one man, for instance, the personal viewpoint should be maintained throughout, and Lincoln, Abraham, or Temple, John Henry, Lord Palmerston, be written in such a way as not to sacrifice easy use of the cards. The rubric of the author entry of official papers in the main catalogue depends upon the department of the civil government of the State from which they emanate and not upon the individual who happens to be at the head of the department at that particular time; *e. g.*, the Emancipation Proclamation, considered as a Government document, would be entered:

1863 UNITED STATES, Executive, President,
Jan. 1 Proclamation of Emancipation. . . .

The cross references would of course take care of Emancipation, Lincoln, Proclamation, etc. In like manner the various executive departments, Navy, State, Treasury, War, etc., would be followed through the executive group alphabetically, the chronological arrangement within each group preserving the correct order of administrations, secretaries, etc. Where the cards are locked in the card trays and there is no chance of disarrangement by investigators, the repetition of these long headings may be dispensed with, to a considerable saving of the cataloguer's time, and a tab card substitute be placed at the head of each divisional group. This is something of a risk, however, and it is safer to compromise by abbreviations on each card. The question of abbreviations on the catalogue or calendar card is a vexed one and may safely be left to the personal preference of the archivist; once the decision is made, consistency alone is necessary. Generally stated, the use of abbreviations increases the liability of misapprehension of the entry.

26. In cataloguing volumes of manuscripts, *i. e.*, not the manuscript contents but the volume itself as a whole, the cataloguer is not bound by the lettered title, especially as this is often misleading and, in European bindings of the earlier centuries, is sometimes downright false. Where there is a title-page, which is not often the case, the same difficulty exists. Here the cataloguer must be at liberty to select his own title or author entry; but he should always quote at the end of the bibliographic description the exact wording of the original volume lettering or title-page. If the collection of unbound manuscripts can be catalogued before arrangement, a sensible plan would be to number temporarily the individual documents just as they come, with a soft, fine-pointed pencil (so that the numbers may easily be erased later) and catalogue them in the same order, numbering the card entries to correspond with the manuscripts. The arrangement best adapted to the papers can then be worked out with the cards and the manuscripts quickly arranged by reference to the pencil numbers.

27. *Calendars*—of manuscripts, which are briefs of the contents, following the catalogue entry and preceding the bibliographic description, are the best means, next to printing in full, of presenting all the salient points of the papers to the investigator. The time and expert service demanded by the work of compilation, however, renders the form a costly one, and at best it can be no more than a guide, elaborate or otherwise, to the documents. Its reason for being is that its fullness of description reduces the unnecessary handling of the manuscripts to a minimum; the investigator being able, with its aid, to discard, without seeing them, all papers not needed for his work. This elimination is a most decided gain in the preservation of the material. The cost of calendaring is high,

27—Continued.

because of the necessary time consumed in it. The calendarer must read, and read carefully, every word of the manuscript and consider the statements therein before composing his brief; in addition to this is the time often needed for research work to establish proper interpretation of indefinite but important allusions in the manuscript. It has the disadvantage too of being tinctured with the personality of the calendarer; for, while a calendar of the same manuscript by two experts would record the same major subjects of the document, these would be presented somewhat differently and, often perhaps, in such form as to give entirely different emphasis to the same fact; the variations in the minor subjects meanwhile, showing still greater differences. For this reason it is unwise to entrust the calendaring of a collection to more than one calendarer as the editorial labor of bringing two or more viewpoints into conformity for indexing, after the calendar entries are made, would mean a practical rewriting of the entire work, with consultation of the original manuscript in every case of doubt. The slightest experiment will prove that, even with the most learned editing, a change of a single phrase or sentence of a calendar entry without comparison with the manuscript is wholly unsafe.

28. Calendaring.—The most convenient and most easily managed form of calendar entry states the subject heads of the letter or document in the order in which they appear therein in short phrases or sentences separated by semicolons. An example follows:

Head Qrs. July 11th, 1782.

Dr. Sir,

I have this moment received a Letter from Count De Rochambeau (by one of his aides in five days from Williamsburg) informing me that he is on his way to Phila—that he will be there the 13th or 14th & wishes an interview with me—

28—*Continued.*

for this purpose I shall set out in the Morning very early & have only to request your usual attention.

I am Dr Sir

Yr most Obedt. Ser.

GO: WASHINGTON.

P. S. I entreat that great diligence may be used in manoeuvring the Troops—If Genl. Carleton should in my absence send out the proceedings of the trial of Lippencott let them be forwarded to Head Qrs that they may follow me—accompany them with your own and the opinion of the Genl. officers whom you can readily consult as my measures must be taken so soon as these proceedings come to hand—& my stay in Philadelphia for aught I am apprized of at present will be very short.

Yrs as before

Maj. Genl. Heath.

The calendar of the foregoing would be:

1782 WASHINGTON, George. [Newburgh.] To Maj. gen.
July 11 [William] Heath [Highlands]. Journey to Philadelphia to confer with Comte de Rochambeau; directions respecting the receipt of trial proceedings of [Capt. Richard] Lippincott. A. Df. S. 2 pp. 4°

This may be expanded as follows:

1782 WASHINGTON, George. [Newburgh.] To Maj. gen.
July 11 [William] Heath [Highlands]. Comte de Rochambeau on his way to Philadelphia; Washington to meet him there for a conference; sets out tomorrow; orders troops practiced in manoeuvres; proceedings of [Capt. Richard] Lippincott's trial to be forwarded, when received, with opinion of general officers thereon; length of stay in Philadelphia. A. Df. S. 2 pp. 4°

It may sometimes be possible to establish a series of single words or phrases under which, according to the character of

28—*Continued.*

the collection, nearly every idea occurring in the papers, or every subject treated can be covered. This would result in a condensation of the above entry to the following:

1782 WASHINGTON, George. [Newburgh.] To Heath
July 11 [Highlands]. Starts for Philadelphia; conference
with Rochambeau; Lippincott trial proceedings.
A. Df. S. 2 pp. 4°

The first of these forms seems preferable. It notes the facts with no waste of words, and omits nothing of importance. Rochambeau's aid, Williamsburg, exercise of the troops, Carleton, and the length of Washington's stay in Philadelphia are unimportant. There is no information in the second form not indicated as existing by the first, and the investigator does not demand and would not accept a statement of historical fact from a calendar entry; but merely requires that it point out to him the original document containing the fact. The third form, while satisfactory in the main (here, as in the first form, the mere order to exercise the troops is an inconsequential matter of daily routine, and the opinion of the general officers on Lippincott's trial of little consequence until given) excites a small amount of distrust, as in the hands of a hasty calendarer such extreme condensation may easily lead to an omission. The exceedingly full and, for the purpose, admirable, calendars of the British State Papers are but once removed from verbatim publications of entire documents, and vary so slightly from this in many instances that, from the standpoint of time and expense of publication, they amount to the same thing, and so need not be considered here. They are, however, despite a somewhat unnecessary wordiness, delightfully satisfactory to the investigator, who has neither the time nor the money for a visit to England or copies, and for most historical work they are practically as good as the manu-

28—*Continued.*

scripts themselves. For the briefer forms used here the point may be made that the basic idea is that of a mere index guide to the contents of the manuscripts. On this principle let us consider another example of calendaring in the following paragraph:

The wagonmaster will provide teams to transport 200 barrels of flour to Fishkill Landing and load the same upon the barges there, but I fear the condition of the ice in the River and the leaky state of the boats will prevent them crossing to West Point before Monday.

Calendared this would read: Flour for West Point; condition of barges. The wagonmaster performing routine work is of no consequence, especially as he is not named; Fishkill Landing in such connection even less so; or the state of the river. The number of barrels and condition of the barges will be looked up by the investigator, if he is interested in either flour or boats. In any event, the things to be known about the paragraph are that West Point, flour, and barges are mentioned therein, and this is all that the investigator demands of the calendar. If he is interested in either flour or barges or West Point he would still insist on reading the manuscript paragraph, even though the calendar entry mention the number of barrels and that the barges leaked. A fuller entry, but without added gain to the investigator, would be: Flour from Fishkill Landing for West Point; ice in the [Hudson] river; leaky state of barges. A choice is a matter of personal preference. A general rule for calendaring may thus be stated: Note the subject matters treated in the manuscript; but ignore the treatment of them.

29. The best method to follow in calendaring is to make the index entries or cross-references at the same time that the cal-

29—*Continued.*

endar entry is written, instead of following the usual book method of leaving the index until the entire work is completed. Indeed, the best result is to be obtained by making the cross-references from the *original manuscript* itself and, with these as a basis, to construct the calendar entry. These calendar or main entries should be numbered consecutively, and the cross-references refer to this number. The advantage of this plan is that all the work is done at the one time when the calendarer is most familiar with the manuscript in all its aspects, and as the indexing proceeds with the calendaring he is able to establish an uniformity of phraseology that greatly increases the exactitude and clearness of the work. A little experience in calendaring and the subsequent indexing will show that, although the general principles of book or running text indexing hold true, the entire viewpoint is different, the attention to detail is more exacting, and scarcely one of the recognized forms or rules can be applied without considerable modification. An ever-present danger in calendaring is that of a too hasty reading the manuscript to be briefed. The danger of misconception of the writer's meaning is to the inexperienced considerable; and the necessity of historical knowledge, sound judgment, discrimination, and an unbiased mind is absolute. The printed book assumes that the reader knows nothing, or (except in the case of technical works) very little of the subjects discussed; but with the manuscript letter the opposite is the case. The writer knows that the recipient of his letter is familiar with all, or nearly all, of the aspects of the subjects he mentions; and as a result his meaning, clear as crystal to the correspondent of the years gone by, is to-day elusive and often difficult of exact interpretation. It is here that the archivist's knowledge and training count most heavily. He should be able to project himself mentally back into the period

29—*Continued.*

of the papers he is calendaring; to revive for himself something of the habits of thought of the times. With knowledge of the trend of events, personality of the writers, their ambitions, struggles, victories, and defeats, he is able to grasp more surely the tenor of the written words and more nearly to translate the thought of the brain behind them. It will be found that the long letter is generally easier to calendar than the short; a letter of four folio pages can often be calendared in as many phrases, while one of barely 30 lines' length may require a dozen sentences or more.

30. The phrase-sequence of the calendar entry is the same as the order in which the subjects are mentioned in the manuscript. These phrases are condensed to a limit consistent with clear and accurate statement, and in themselves partake of the character of index entries; the result is that the index, or cross-references of the calendar, form practically an index of an index. The composition of these two, calendar phrase and index word, are full of pitfalls for the indexer inexperienced in such work. The needs to be supplied by these entries are quite different from those demanded of the book indexes. The indexer of a calendar is twice removed from the material he is indexing; yet the index should reflect, not the calendar entry but the manuscript itself. The calendar phrase is, of course, the real index entry of the manuscript, and in its selection the calendarer is even less restricted than the book indexer; but in indexing this calendar phrase the freedom vanishes, and an uncompromising rigidity of expression becomes necessary. Exercise of the slightest freedom here will, because of distance from the original material, tend, almost invariably, to mislead the user of the calendar by promising more than the original manuscript can furnish. Again, the indexer has no choice but to consider that his

30—*Continued.*

work must answer a thousand different historical inquiries, each one equally important to the individual investigator. It is this comprehensiveness that makes for so much drudgery in calendaring work. Every manuscript, no matter how trivial, must be given, relatively, the same amount of attention and care. The editorial privilege of "selection" does not exist in such work, and the slightest exercise of discrimination is to be deplored. The exclusion of all unnecessary words from the calendar entry, especially if the calendar is to be printed, will effect a considerable saving of space and cost in composition. It is a waste of words to start the entry with such expressions as "concerning," "relating to," "respecting," etc. In the body of the entry it is sometimes necessary to use them, but as a description of the contents of a letter or document they are worthless. The letter must "relate to" or be "respecting" something or it would not have been written, and to continue to state this obvious fact through dozens of entries is obviously absurd. In like manner to commence the entry with "Letter to . . ." is unnecessary, as the symbols A. L. S. or A. D. S. are sufficient on this point.

31. *Printing.*—Where the calendar is to be printed, certain mechanical details may be followed to advantage. The entry in type does not differ from the form already given, except that the year and catchword should be printed in caps or boldface font. If the indentation after the rubric line is made only one *em* greater, a considerable saving in composition cost will be effected. In making a calendar which is to be printed, the great advantage of numbering the entries (the number to be in boldface type at the end of the last line of the entry), and of always making the index at the time of writing the calendar entries, will be distinctly felt. The

31—*Continued.*

index cards, of thin manila paper, should be filed daily. This is tedious, but the advantage, as well as the relief of being able to send the complete copy, including the index, to the printer all at once is obvious. In the printed form, names of prominent personages appearing in the calendar hardly need bracketing out in full where there is little danger of confusion of identity—as of Grant, Lincoln, Sumner, etc., in a collection of manuscripts covering the Civil War period, or Wayne, Arnold, André, Gates, etc., in a Revolutionary collection. The full names and full titles would appear, properly and once for all, in the index; but in the calendar entry it is well to prefix military and naval titles, such as maj. gen., rear adm. l.; the clergy, Rev., the President and Vice President of the United States, Governors, and the medical Dr. With minor individuals, however, such as Smith, Brown, or Jones, or where names are in part alike, as Maj. Gen. Nathanael Greene and Col. Christopher Greene, the Butlers and Howes of the Revolution, distinctions must be made in the calendar entry also.

32. *Repairs.*—Repair work of any important character should never be attempted but by experienced hands. A wide knowledge of paper, the kinds, the qualities, the effects of age and of accident, and its behavior under every condition is necessary before one is justified in working upon a manuscript of value. A few hints of a general nature, however, may safely be given, but with the distinct understanding that they do not apply in any way to parchments. Every manuscript should be cleaned and pressed; that is, all the wrinkles removed and smudgings of dirt lessened. To accomplish this, if the manuscript is very much begrimed, but the paper still retains its life, it should be immersed in *warm* (not hot) water in a flat pan similar to the photographer's developing

32—*Continued.*

tray, and rocked gently for a time. This is a perfectly safe proceeding for any manuscript prior to the year 1800 that is not mildewed nor brittle. After that date the quality of the ink is doubtful, and, though much of the writing of the first decade of the Nineteenth century is safe, too much care can not be used in dealing with it. Any manuscript in ink that has the slightest tendency to run must never, of course, be moistened. The difficulties encountered in the aniline and cheapened inks of the early 1820's are too many and varied to be disposed of in a paragraph, so must be dismissed with the suggestion that it is best to turn such matters over to the man who knows; but to make him prove it before you intrust him with your valuable paper, otherwise the document may be hopelessly ruined. After the tray bath the manuscript is removed and placed between fine-grained towels or sheets of blotting paper, stretched flat on the table, and the upper towel, or blotter, rubbed with gentle pressure for a few moments (never, under any circumstances, rub in the slightest upon a damp manuscript). If the manuscripts are not soiled nor needing a bath they should be sandwiched between sheets of *damp* (not wet) newspaper (never the Sunday colored supplement), a single sheet of manuscript, then a single sheet of newspaper, another manuscript, another news sheet, etc. After three or four hours the manuscripts, removed from the news-sheets, should be placed between sheets of smooth, white, unglazed pulpboard, a single sheet of manuscript between two sheets of pulpboard. The pulpboard is sufficiently porous to absorb moisture, and best adapted for this particular need. A pile of these a foot or more in height may be placed at one time in the press. Here they should stay about ten hours, care having been taken in placing them between the boards that no edges are turned nor wrinkles

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folded in. At the end of that time the manuscripts are dried out perfectly flat and present a marvelously better appearance. As to patching torn manuscripts and strengthening dilapidated ones, a brief discussion of the general, technical principles of such work could be but partially satisfying, and a full discussion is out of the question. The Library of Congress uses crêpeline, a mixture of cotton or silk gauze (or fine, mercerized, bolting cloth), with which to cover its torn or dilapidated manuscripts. It is, or was, of French manufacture and can be obtained from any large dry-goods house. It is pasted to the manuscript with flour and water paste of the following formula:

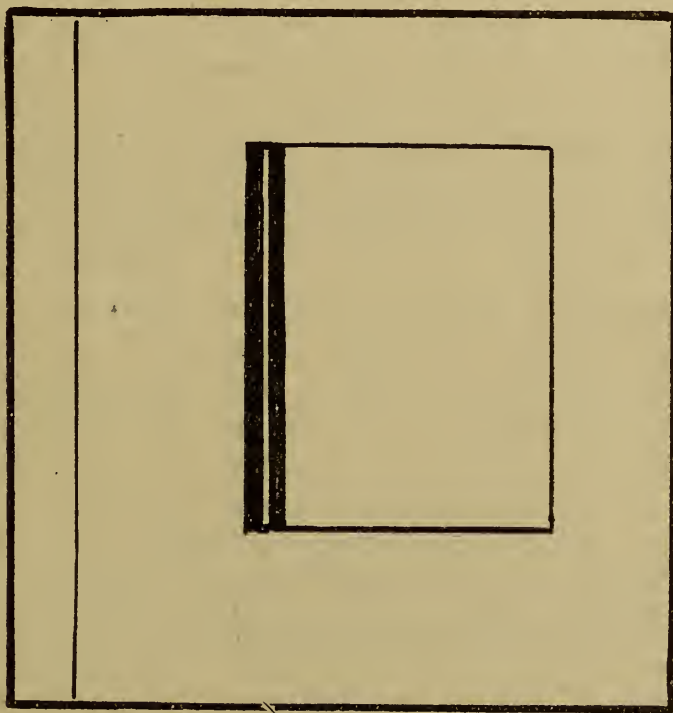
One cup of best wheat flour; three cups cold water; $\frac{1}{4}$ teaspoonful of powdered alum; four grains of white arsenic. This is beaten until free from lumps and then boiled for ten minutes in a double boiler. When cold remove the skin from the top and beat up well.

This paste is used for all the work. Mucilage or the various manufactured white pastes on the market should never be used for manuscript work; they are ineffective in every way and dangerous. The manuscript, after dampening and pressing as described, is thinly coated with the paste by means of a camel's-hair brush and the crêpeline laid on; it is then placed between sheets of paraffin paper, put between pulp boards, and put in press for 15 minutes; then removed from the press, the paraffin paper taken off, and again placed between sheets of pulp board under very slight pressure until dry. One side of the manuscript must not be crêpelled unless the other is also, for the resultant unequal strain will curl it with a curl that no amount of pressure can ever reduce. Above all, the operator should beware of attempting any repair work upon a manuscript of value unless he knows exactly how the paper will act during the process.

33. *Mounting and binding.*—After cleaning and pressing the manuscripts may be mounted upon sheets of uniform size and of a quality of paper dependent upon the expenditure permitted. Good quality white linen ledger is excellent, and it should be cut so that the manuscript can be mounted thereon with the grain of the paper; the grain of the mounting sheet running vertically to insure flexibility in opening after binding, a thing impossible if the grain of the paper be horizontal. A good quality rope-manila paper is cheaper, is the strongest of papers, and, in the lighter weights, possesses great flexibility. Its color, under some circumstances, may be considered an objectionable feature, but it is the only one. Manuscripts should never be mounted unless they are to be bound at once, as handling in mounted form while unbound greatly increases the liability of damage. The mounting sheet should allow at least a full inch and a half on the left beyond the established size of the page desired for the binder to fold and stitch; and the established size of the page depends upon the average size of the manuscripts to be bound. A margin of 2 or 3 inches all around the manuscript is ample; but, if there are many extra large papers in the collection, a size must be decided upon that will accommodate them with the least amount of cutting and hinging, and at the same time not increase unnecessarily the size of the volume for the sake of a small percentage of the papers. A good average size for the mounting sheet is 10 inches wide by 14 inches high, exclusive of the necessary extra margin for the binder. In the case of military muster rolls, returns, etc., which are apt to be unusual in size and proportion, an average should be struck and the rolls cut and hinged thereto. Drastic as this may seem, it is, in the end, a safeguard and protection to the manuscript, as the risk of damage

33—*Continued.*

by awkward investigators is much greater to large papers than to large papers cut and hinged to a smaller size with reenforced folds that serve as a protection. The general method of mounting is with strips of the lightest weight architect's tracing linen about one-half inch wide, impinging equally upon the mounting sheet and the manuscript, with a fraction of an inch free from paste to permit free play to the hinge.



A good bond paper is a fair substitute for the tracing linen; but care must be used in cutting this with the grain of the paper running lengthwise of the strip, otherwise smooth work is impossible. There are different methods of placing this hinge, either concealing it or not, by folding, as desired.

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Do not cut the strips with the scissors; a sharp knife will alone give the straight edge necessary. At times the nature of the manuscript may require that it be hinged at the top instead of at the side; in such cases it is a wise precaution to paste a neatly printed warning at the top of the mounting sheet, otherwise an investigator will infallibly half tear the manuscript from the mount, if he does nothing worse, before realizing the different location of the hinge. After the manuscripts are mounted they should be bound. Any convenient number of sheets to the volume may be established; but a thickness of over 2 inches will be found cumbersome to handle and, with increase of difficulty in handling, comes increased danger of accident to the manuscripts. The advantages of preservation in bound form are too obvious to need discussion; but, of course, a collection likely to receive numerous additions should not be bound until the chance of increase has largely disappeared. As the compensating stubs, always necessary in bound volumes of manuscripts, will easily take care of an increase of a dozen or so manuscripts per volume, the possibility of a small number of accessions is hardly an offset to the continued risk of unbound collections. The various forms of binding and different binding materials are of small moment compared with the work of bringing the manuscript material to the point where the binder is needed; and a knowledge of the various leathers and buckrams, finishes and letterings, etc., while desirable is not essential, where a competent foreman of binding can be consulted.

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